

# ATS empowers India's leading public sector bank leverage Tableau to streamline their reporting and data pipeline



## About the Customer:

**Industry:** Finance – Banking

**Company Description:** The customer is an Indian multinational public sector bank and financial services statutory body headquartered in Mumbai, Maharashtra and is the 43rd largest bank in the world and ranked 221st in the Fortune Global 500 list of the world's biggest corporations of 2020, being the only Indian bank on the list. It is a public sector bank and the largest bank in India with a 23% market share by assets and a 25% share of the total loan and deposits market. It is also the fifth-largest employer in India with nearly 250,000 employees.

## Challenges:

- Static reports with lack of interactivity of reports
- Unavailability of visual analytics and relevant business insights

## Business Use Case:

As part of the engagement, GTL was expected to build Tableau dashboards for the performance reporting reports, currently consumed by the customer team. Also recreate few dashboards to be dynamic and insightful with drill-down functionality while replicating the existing dashboard for 1-2 verticals.

Data sources – Data to be extracted in CSV/excel files for the POC and would be provided by the customer team.

Departments/ segments – All the LOB of the customer (Retail, CGG,CAG , GMU , SARG, IBG).

Tentative # dashboard – 15-20 dashboards with multiple tabs.

Duration – 6-8 weeks.

## Overview of P Reporting

1. End of period (month) outstanding balances, achievement against budgets for state of business reports
2. P/L is a separate set of dashboards, broken down by P/L section (Interest Income/Expense, Overheads, Capital etc.)
3. Dashboards here show end of period balances across dimensions above in a matrix structure. Eventually a user is able to drill down to a product and a branch (that being the last level of detail)
4. The report will be a combination of extracted data and calculations.

## Business UseCase:

Replicated and created new dashboards for the P-review reports of the customer built in .net application for showcasing the fast analytics of tableau with no-coding requirements.

The developed dashboards powered to showcase those analytics should be about asking questions and not learning software.

Provided with data of Advances, NPAs and Deposits segments of the customer as a text file along with the branch master containing Whole Bank-level hierarchy from Network to Branch level details. Completed the development of the dashboard in three phases.

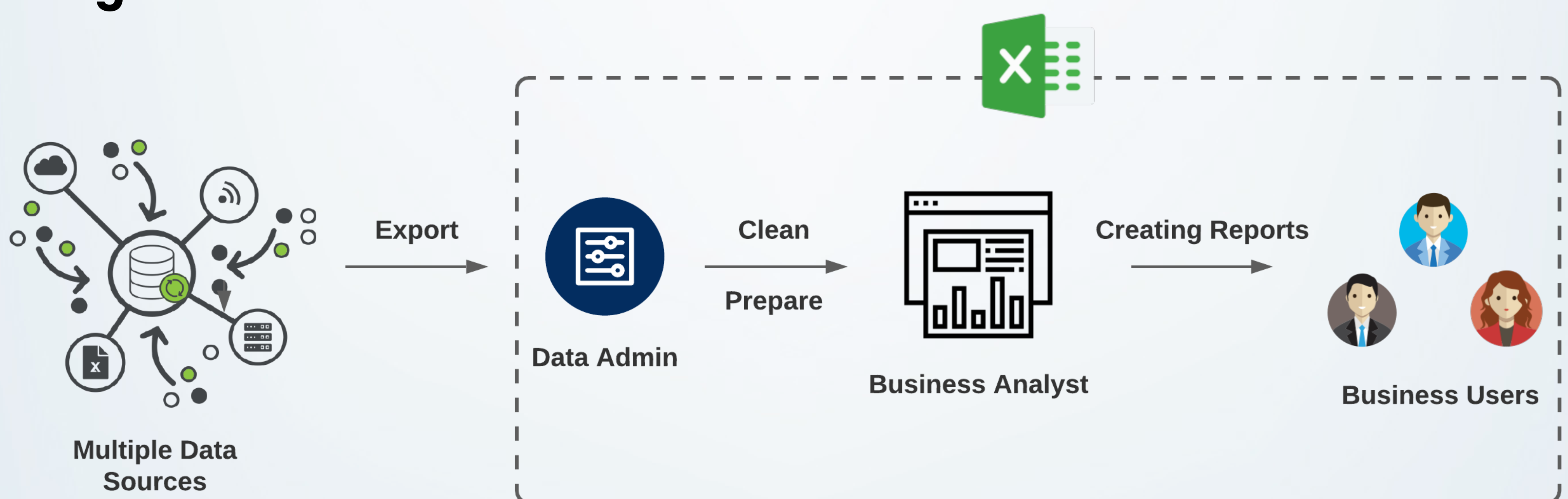
**Replication:** Replicating the original cross tab reports in tableau, showing fast analytics capabilities whereas using the legacy dashboard building software takes months and strong technical requirements.

**Improvisation:** Tableau version of the same cross tab reports for visual analytics helping in realizing the insights and Knowledge, which is not gained from normal cross tab reports.

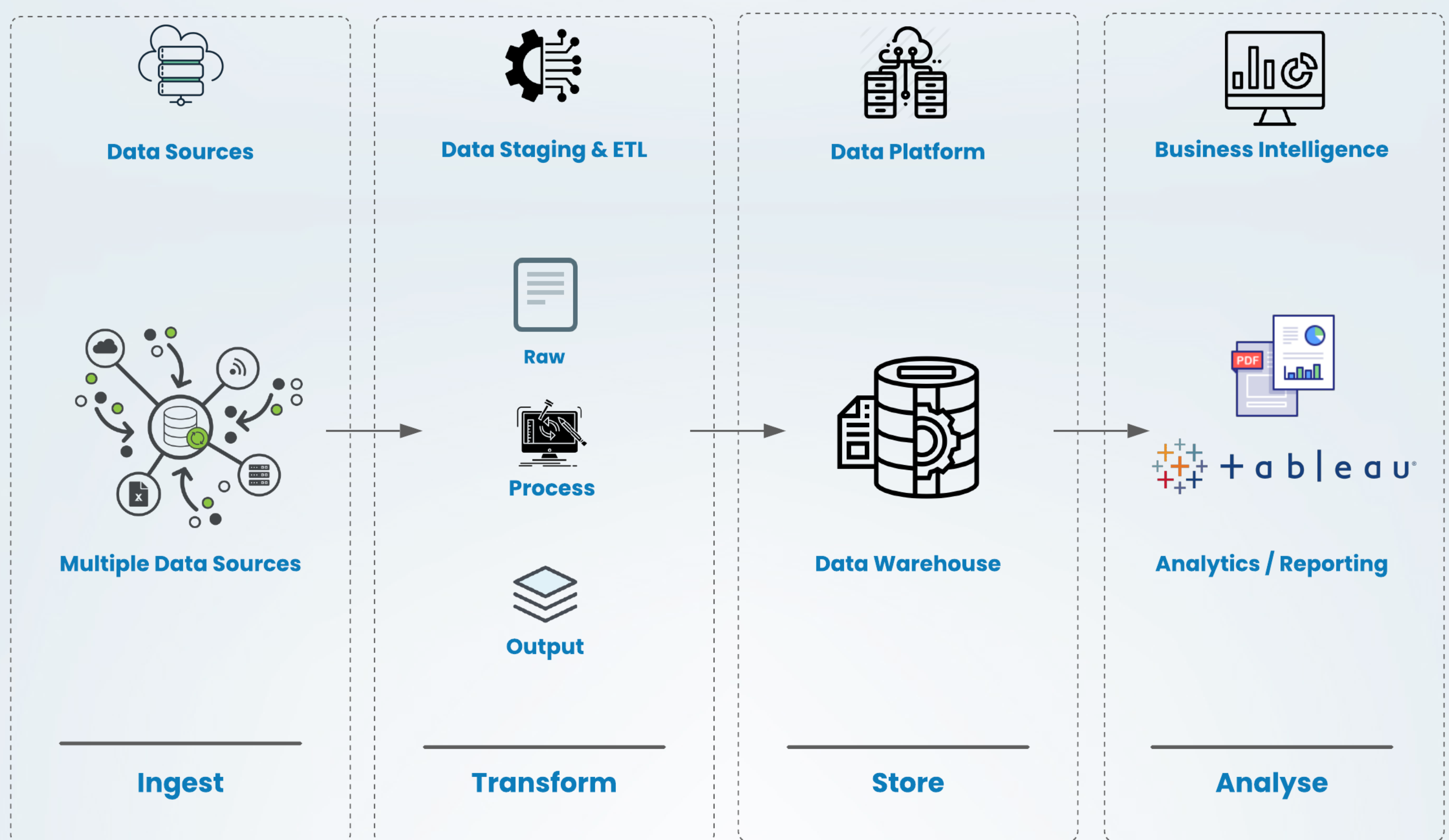
**Consolidation:** Combined Advances, NPAs and Deposits reports in a single dashboard unavailable previously within the customer's dashboards ecosystem, which enables end-users to compare all the three segments at all levels of hierarchy or granularity within the Bank.

Ask Data feature is also enabled on the tableau server which enabled users to type a question in normal English and get answers in visualization form instantly with saving and sharing capabilities.

## Existing BI Architecture



## Proposed Solution



## Business Impact

- Multiple users from different locations can access the necessary information readily and reliably.
- Any discrepancies in terms of data and transactions of Advances, Deposits and NPA have been resolved.
- Interactive dashboards with slice & dice capabilities helped in getting relevant business insights
- Cross-functional business understanding and comparative analysis were now possible due to aggregated reporting of various segments and functions.

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